# Monitoring Process (Title 3 & Title 7)
## December 2017

**Phases:** Preparing for Onsite Visits | Onsite Visits | Post Onsite Visits

### Monitoring Coordinator
- Start
- 60 Days Before Onsite Visit Occurs
- Create A Doodle Poll and Email to AAA EDs With Notice
- **2 Business Days** — Notifies Monitoring Team of Secured Dates. Requests a Car, Hotel Reservations & Scheduling of a Debriefing Mtg
- Disburses Reservations to Monitoring Team
- Sends Template Email, Monitoring Tool, List of Documents to Have Available & Any Documents to be Completed Before the visit to AAA EDs and Applicable AAA Staff
- Forward to IDA Program Mgr or Fiscal
- **5 Bus Days Before Onsite Visit** — Schedule Prep Mtg
- *Entrance Meeting With Monitoring Coordinator & AAA ED

  *Monitoring Team Conduct the Following:
  - Completion of Monitoring Tool
  - File Review
  - Meal Site Visit
  - Home Visit
  - Staff Interviews

  *Exit Interview With Monitoring Team, AAA ED and Any AAA Staff AAA ED Desires
- **2 Bus Days** — Complies Draft Findings in Preparation of Debriefing with Management
- **2 Bus Days** — Finalize and Email Letter, Findings, & Survey
- POC Needed? (Yes / No)
- Sends AAA POC Response to IDA Staff For Review
- Develops Approval Letter & Sends to AAA
- End — Final Docs Stored on Shared Drive

### IDA Program Manager
- Coordinate Schedules and Determine Dates For Onsite Visits
- Secures Monitoring Date(s)
- Review AAA Documents Before Prep Meeting
- Participate in Monitoring Onsite Prep Meeting

### IDA Fiscal Support
- Secures Monitoring Date(s)
- Review AAA Documents Before Prep Meeting
- **2 Bus Days** — Compile Draft Findings and Send to Monitoring Coordinator
- Review AAA POC Response
- Approved? (Yes / No)
- Compliance Remedies TBD

### IDA Administrative Support
- Schedules a Debriefing Mtg With Mgmt, Reserves Cars & Hotel Rooms Sends Reservations to Monitoring Coordinator

### Area Agency on Aging
- Complete Doodle Poll to Select Dates and Submit — **10 Bus Days To Respond**
- Complete Documents and Return — **15 Bus Days To Respond**
- Participates in Onsite Monitoring
- Receives Letter, Findings and Survey
- Receives POC, Completes and Returns
- Receives Approval Letter

### IDA Mgmt
- Debriefing Meeting
- Follow Up/Edits? (Yes / No)

**GOAL:** Have letter, findings and survey sent to the AAA within 20 business days of onsite visit.